

NEW PROCESS VITA & AARP

Volunteer Income Tax Assistance

2021 Free Income Tax Assistance

for individuals and families with low-to moderate incomes (generally \$56,000 and below for VITA)

- **AARP** (focus on senior citizens) Will be providing assistance by appointment only. Call the Avondale Community Resource Center at 785-233-1365 or the Jayhawk Area Agency on Aging at 785-235-1367 for more information. The Avondale site can provide assistance in Spanish.
- **VITA** (Usually found at the Topeka & Shawnee County Library and the Rossville Library among other places) will be offering **tax assistance by mail** this tax season. **Face-to-face assistance will NOT be available.** We do have assistance available in Spanish.

Instructions for mailing documents to VITA

Items must be received by April 1st 2021

1. Print and complete the following intake forms found at Shawnee.K-state.edu. Make sure forms are signed and that an accurate phone number and email address is provided. We cannot prepare your taxes without a working phone number.
 - a. [Form 13614-C \(Intake & Interview Sheet\)](#)
 - b. [Form 14446 \(Virtual Consent Form\)](#) **clients only need to fill out page 3**
 - c. [Form 8879 \(E-file Signature Authorization\)](#) **fill out name and social security numbers at the top of page then sign and date under Part 2**
 2. Make photo copies of the following:
 - a. Government issued photo id of taxpayer and spouse
 - b. Social security cards or social security number verification letters or Individual Tax Payer Identification number letters for you, your spouse, and any dependents born on or before December 31, 2020
 - c. All of your tax documents (See list)
 - d. A voided check if you want direct deposit.
 3. Mail all of the above from steps 1 and 2 to the following address:

Shawnee County VITA
4021 SW 10th Street #415
Topeka, KS 66604
- Once we have received all needed documentation, one of our volunteers will prepare your tax return then call you on the phone to review it. We will then electronically submit your return to the IRS and required states. A copy of the return will be mailed to you.

List of needed tax documents: (Please provide copies of each document that applies)

- W-2 forms from all 2020 jobs
- All 1099's
 - 1099-G- if you received unemployment insurance benefits or a state refund in 2020
 - 1099-INT- if you received interest paid by a financial institution in 2020, or the year-end statement showing any interest you received
 - Any other 1099 forms including SSA-1099 (Social Security), 1099-DIV, 1099-MISC, and 1099-NEC
- 1095 (health insurance forms)
- 1098 (tuition)
- First & Second Economic Impact payment amounts (Notices 1444-A & B)
- Any other notices received in 2020 from the IRS by any person on the tax return, this includes a current identity protection PIN number if one was assigned to anyone on the return by the IRS
- W-2G (Gambling income)
- 2020 Property Tax statement or receipt if claiming the Homestead Credit.
- Details of all charitable donations with receipts for those of \$250 or more

NOTICE:

Volunteers prepare Federal Income Tax Returns and state returns including the Homestead Credit

Volunteers can prepare amended and prior year returns for the following years only: 2019, 2018, and 2017

Volunteers will NOT prepare:

- Schedule C (Profit or Loss from a Business) with expenses in excess of \$35,000)
- Complicated and Advanced Schedule D (Capital Gains & Losses)
- Schedule E (Rents and Royalties)
- Schedule F
- Form 8615 (Minor's Investment Income)
- Returns for clients currently involved in a bankruptcy proceeding
- Returns with virtual currency

For questions call a VITA volunteer at 785-213-9002. Please leave a message if your call is not answered and someone will get back with you.

VITA Partner Agency
K-State Research & Extension
1740 SW Western Ave.
Topeka, KS 66604 785-232-0062
Susan Fangman, FCS Agent

This form can be downloaded at <https://www.shawnee.k-state.edu/family-finance/NEW%20PROCESS%20%20%20%20VITA.docx%20%20For%20WEBPAGE.pdf>